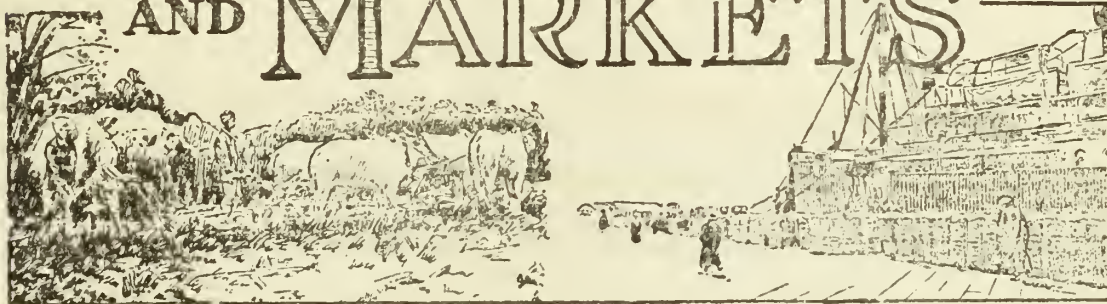


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FOREIGN CROPS AND MARKETS



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HUNGARIAN HOG AND PORK INDUSTRY

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L A T E C A B L E S

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Chosen (Korea) 1935-36 rice crop forecast at 5,745,000,000 pounds of cleaned rice, compared with 5,389,885,000 pounds produced in 1934-35. (International Institute of Agriculture, Rome, November 8, 1935.)

Japanese cotton situation marked by more stability than apparent during past few months. September moderately dull but increased activity expected during fall. American cotton imports held their own better than did Indian. Imports for coming months expected to show increases due to recent active buying of American. (Acting Agricultural Commissioner F. J. Rossiter, Shanghai, November 6, 1935.)

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CROP AND MARKET PROSPECTS

BREAD GRAINS

Summary of recent production estimates

The estimated 1935 wheat crop in 45 countries reported now totals 3,356,611,000 bushels as compared with 3,334,638,000 bushels produced by the same countries in 1934, when they accounted for about 96 percent of the estimated world total, excluding China and Russia. Slight revisions were received during the week for Austria and Mexico, while the estimates for Czechoslovakia and Turkey were increased by 2,696,000 and 3,072,000 bushels, respectively.

Rye production in 1935, as estimated for 30 countries, now totals 958,947,000 bushels, which indicates an increase of about 4 percent over the 1934 harvest of the same countries. The revised estimate for Czechoslovakia indicates an increase over the 1934 crop of about 8 percent, while in Austria a gain of 2 percent is expected.

Current changes in wheat and rye estimates

Commodity and country	Reported up to Nov. 4, 1935	Reported up to Nov. 11, 1935	1934
	1,000 bushels	1,000 bushels	1,000 bushels
WHEAT			
45 countries reported.....	3,351,098		
Mexico.....	10,611	10,279	10,950
Austria	15,513	15,590	13,308
Czechoslovakia	59,400	62,096	50,014
Turkey	90,094	93,166	99,711
45 countries reported.....		3,356,611	3,334,638
RYE			
30 countries reported.....	956,802		
Austria.....	23,089	23,129	22,617
Czechoslovakia.....	62,380	64,485	59,968
30 countries reported.....		958,947	926,352

The wheat situation in the Danube Basin

Fall seeding operations in the Danube Basin were delayed by the unusually dry weather prevailing in September and early October, according to the Belgrade office of the Foreign Agricultural Service. Most of the fields intended for winter wheat for the 1935 crop were not yet sown on October 15 on the plains of Rumania and Bulgaria and in some sections of Yugoslavia. In Hungary, however, where the practice of sowing wheat in corn stubble is not followed as extensively as in the other Danubian countries, seeding was in progress by late September, good rains in late August and early September

C R O P A N D M A R K E T P R O S P E C T S , C O N T ' D

having made it possible to get the soil in readiness. The early sown wheat in Hungary is said to have germinated satisfactorily, but in Rumania it was feared that the early seedings would perish if dry weather continued.

In spite of the adverse weather conditions experienced in most of the Basin, it was generally believed that the acreage sown to winter wheat for the 1936 crop would exceed that sown in the fall of 1934. This belief was based largely upon the favorable prices now prevailing for wheat and the outlook for disposing of the crop as a result of Italy's war operations.

The 1935 wheat production of the Basin is still estimated by the Belgrade office at 298,000,000 bushels as compared with 251,283,000 bushels harvested in 1934. It is expected that most of the 1935-36 exportable surplus of the Basin, placed at 36,000,000 bushels, will not be shipped until next spring because farmers are withholding their supplies in expectation of further price increases. This is particularly true in Hungary, where farmers expect to obtain high prices from Italy for their wheat. Exports during July-October totaled only about 8,500,000 bushels, over half of which originated in Hungary and went to Austria, Switzerland, and Italy. Rumania and Bulgaria both shipped to the United Kingdom, with some wheat going to Switzerland from the former and some from the latter to Belgium and the Netherlands. Yugoslavia has exported practically no wheat so far this season. Exports from the Basin as a whole to central Europe have been handicapped by a scarcity of barges on the Danube River and its tributaries, where the water has been exceptionally low.

Wheat prices increased in the Danube Basin during October, but in spite of this, farmers were reluctant to sell their grain, because they hoped for further increases later on. Consequently, the mills were having difficulty in securing wheat and were forced in some cases to bring supplies from remote regions in order to take care of their current needs.

FRUIT, VEGETABLES, AND NUTS

Cuban imports of American dried fruit increase

Although Cuba is a relatively small export market for American dried fruit, some expansion in this market is in order because of improved economic conditions in Cuba and lowered import duties, according to Howard S. Tewell, American Consul at Habana. The Consul points out that sugar prices, which are directly related to Cuban purchasing power, have been at the highest levels in recent years. Dried fruit must be imported into Cuba, since, with the exception of canned pineapple and Guava jelly, domestic fruits are consumed fresh.

C R O P A N D M A R K E T P R O S P E C T S , C O N T ' D

In accordance with the new reciprocal agreement concluded between the United States and Cuba, the duty on American raisins, \$1.365 per 100 kilos (0.6 cent per pound), is the lowest in 30 years. The rate on other American dried or evaporated fruit, \$2.80 per 100 kilos (1.7 cents per pound), is \$1.20 per 100 kilos less than the rate granted to the most-favored competitors, principally Spain, France, China, and Syria. In addition, since July 1, 1935, the Cuban Consular invoice tax on imports of American products has been reduced from 5 percent to 2 percent of the value f.o.b. port of exportation, whereas the rate on imports from other countries remains at 5 percent.

Raisins constitute the largest single item of dried fruits imported into Cuba. Prior to 1931 the United States supplied less than half of the Cuban raisin imports, whereas in recent years American raisins have comprised from 60 to 70 percent of the volume. Consumption of cluster raisins from Spain has been declining in favor of the dark seedless varieties, as seeded or bleached raisins are in little demand. American raisins are almost exclusively imported into Cuba in bulk in 25-pound boxes.

Imports of prunes closely follow raisins in their importance in the Cuban trade. The most popular size is 40/50's, most of the remaining requirements being 50/60's. Only a small part of the imports are in cartons, the usual package being the 25-pound box. The volume of dried apricots and peaches consumed in Cuba is small. The relatively high prices at which these fruits are sold restricts the market principally to members of the foreign colonies and a few well-to-do Cubans. Fancy quality apricots and peaches are preferred, since lower grades are stated to develop an unfavorable appearance because of the climate. Only very small quantities of dried pears and apples are imported, the latter being used principally by bakers.

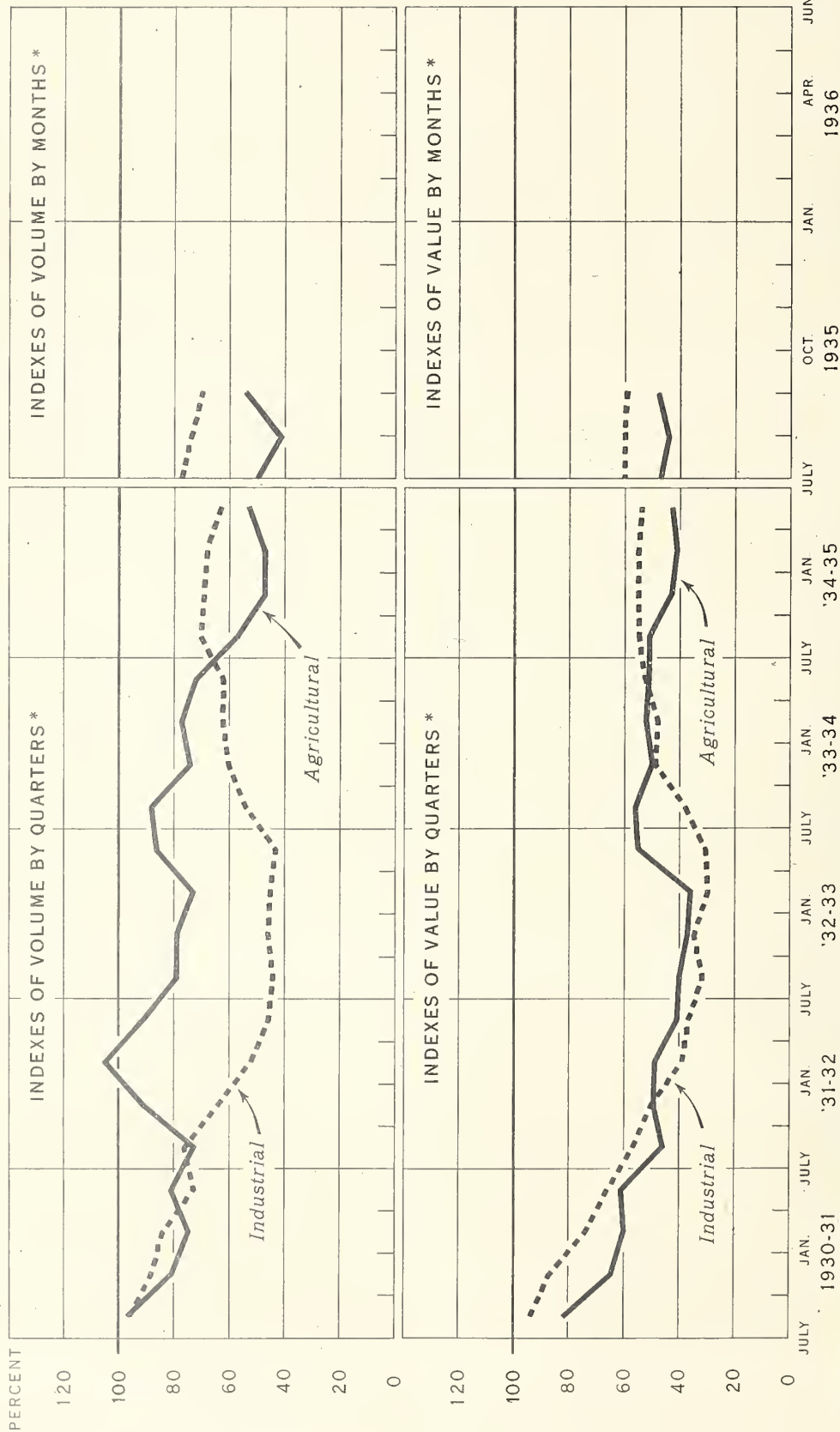
LIVESTOCK, MEAT, AND WOOL

Animal slaughter in Uruguay increases

Total animal killings in Uruguay for the first nine months of 1935 showed substantial increases along all lines as compared with the first nine months of 1934, according to Aubrey E. Lippincott, American Vice Consul at Montevideo. The percentages of increase in numbers of cattle, sheep and lambs, and hogs slaughtered were respectively 22 percent, 15 percent and 3 percent. The killings effected during the months of January to September, inclusive, in 1935 were 808,499 cattle, 364,603 sheep and lambs, and 42,992 hogs, compared with 660,255 cattle, 317,184 sheep and lambs, and 41,716 hogs in the corresponding period of 1934.

UNITED STATES: INDEXES OF EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS,⁴ QUARTERLY 1930-31-1934-35 AND MONTHLY 1935-36

10-YEAR AVERAGE (1923-32=100)



UNITED STATES EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS a/

No definite trends in the export of agricultural and industrial commodities developed in the first three months of the current crop year. The table below, showing indexes of volume and value, gives some indication of a slight downward trend in the volume of industrial exports, but the value remained practically constant. Fluctuations in the volume and value of agricultural exports did not furnish conclusive evidence either of a decline or an advance for the new crop year.

UNITED STATES: Monthly indexes of agricultural and industrial exports, July to September, 1935, adjusted for seasonal variations, 1923-1932 average = 100

Classification	Volume			Value		
	July	August	September	July	August	September
	:	:	:	:	:	:
Agricultural exports..:	50	41	55	47	44	47
Industrial exports <u>a/</u> ..:	77	74	70	60	60	59
	:	:	:	:	:	:

a/ Includes all important non-agricultural products except crude materials such as coal, crude petroleum, phosphate rock, and unrefined copper.

Agricultural exports in September turned slightly upward over the previous month, the value returning to the July level and volume advancing beyond the July position. Larger exports of fruits and tobacco combined with a slight increase in exports of raw cotton contributed toward the advance. Although the September decline in industrial exports was distributed pretty generally throughout the list, certain groups of merchandise showed unusually large reductions from previous high levels. Agricultural machinery, automobiles, motor trucks, and busses declined sharply. These products had previously been leaders in the recovery of industrial exports.

Beginning in 1934-35 a very sharp differentiation in the trends of agricultural and industrial exports appeared (see chart on opposite page). Prior to that time the volume of agricultural exports had been maintained at fairly high levels and the volume of industrial exports had been low. The drought which reduced agricultural surpluses was in part responsible for a downturn in exports which occurred at the same time that industry was slowly recovering its export market. The result was a reversal in trend which placed industrial exports at a higher level, in comparison with the 10-year average, than were agricultural exports.

a/ Prepared by Frank L. Lombard, Foreign Agricultural Service Division.

UNITED STATES EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS, CONT'D

UNITED STATES: Quarterly indexes of agricultural and industrial exports 1930-31 to 1934-35 adjusted for seasonal variations
1923-1932 average = 100

Year and Quarter	Volume		Value	
	Agricultural exports	Industrial ^{a/} exports	Agricultural exports	Industrial exports
1930-31:				
July-Sept.....	97	96	82	94
Oct.-Dec.....	81	88	65	87
Jan.-March.....	75	84	60	74
Apr.-June.....	81	73	61	66
1931-32:				
July-Sept.....	73	76	46	57
Oct.-Dec.....	91	64	49	50
Jan.-March.....	105	52	49	39
Apr.-June.....	91	46	41	37
1932-33:				
July-Sept.....	79	44	40	32
Oct.-Dec.....	79	46	37	35
Jan.-March.....	73	45	36	30
Apr.-June.....	86	43	55	31
1933-34:				
July-Sept.....	88	54	56	38
Oct.-Dec.....	74	60	50	49
Jan.-March.....	77	62	52	48
Apr.-June.....	72	62	51	53
1934-35:				
July-Sept.....	57	70	51	55
Oct.-Dec.....	47	69	43	55
Jan.-March.....	47	68	41	55
Apr.-June.....	53	63	53	54

^{a/} Includes all important non-agricultural products except crude materials such as coal, crude petroleum, phosphate rock, and unrefined copper.

Trends in the movement of exports 1930-31 to 1934-35

At the opening of the 5-year period, 1930-31 to 1934-35, the volume of agricultural exports was on the decline. Growing conditions resulted in only a fair crop of practically all agricultural commodities entering into the export trade. A combination of less than average supplies and sharply reduced demand caused the index to fall from 97 percent of the 10-year average during the first quarter of 1930-31 to 81 percent in the final quarter.

UNITED STATES EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS, CONT'D

In 1931, crops were better than they had been for years. The South produced bumper crops of cotton and tobacco. Wheat production was much above previous years and there was a slight increase in the fruit harvest. In addition to the increase of current supplies of cotton and wheat, carry-overs were very large so that there was an exceptionally large total supply of agricultural products available for export. The total volume of agricultural exports rose rapidly early in the marketing season and reached a peak of 104 percent of the average in the third quarter of the 1931-32 season. Increased exports of cotton and wheat were largely responsible for the gain.

In 1932-33 agricultural production declined from the high level of the previous year and the volume of agricultural exports for the year amounted to approximately 80 percent of the 10-year average. A large part of the decline in exports was occasioned by the severe fall in exports of wheat and wheat flour. Exports of fruit were reduced somewhat. All other products maintained approximately the same position as that of the previous year, except for cotton, which showed a slight increase. Most of the increase in exports of cotton occurred in the later months of the season when importers, threatened by an increase in cotton prices as a result of devaluation, hurried to lay in surplus supplies for protection against a continued higher world price. As soon as this operation was completed and demand lost its temporary urgency, the volume of agricultural exports resumed once more its downward course, falling from an average of 88 percent of the base period in the opening months of 1933-34 and 72 percent of the average at the close of the season. There was some reduction in the grain crops and in livestock in 1933, due to drought, which partially explains the downward trend evident in exports during that season.

In 1934-35 the export volume declined sharply, the first quarter showing a total equal to 57 percent of the 10-year average and the year's average standing at 54 percent. The bulk of last year's decline was probably caused by the reduction in exportable surplus enforced by the severe drought of 1935, plus, to a lesser extent, the effects of the domestic production control program then in operation. In 1934-35 the volume of cotton exports showed the first real decrease in several years, and since this commodity had been instrumental in maintaining the level of agricultural exports, a reduction in total was inevitable. The total of other farm commodities exported had fallen to low levels much earlier; exports of cured pork, lard, wheat, and wheat flour in particular had been at very low levels for the past three seasons.

The value of agricultural exports followed a somewhat different course than did the volume. From the first quarter of the crop year 1930-31, when the value index stood at 82 percent of the 10-year average, there was a steady decline until the late winter months of 1933 when value reached the extremely low level of 36 percent of the 10-year average. In the next quarter there was an increase in the quantity of products exported and an advance in prices, which movements combined to raise the

UNITED STATES EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS, CONT'D

total value of agricultural exports to the point where the index stood at 55 percent of the 10-year average. After this recovery there followed a slight recession in the fall of 1933, but the value continued fairly steady at about one half of the 10-year average figure until the fall of 1934 when it fell to 43 percent of the 10-year base. Export value continued at that low level for the remainder of the season.

Since the value and volume of industrial exports have maintained a fairly constant relationship throughout the past five year, it is possible to consider the two simultaneously. Each stood at approximately 95 percent of the 10-year average in the first quarter of 1930-31. The general disruption in world trade which came with the world-wide depression caused United States industrial exports to decline from that level to approximately 70 percent of the average for the last quarter of the fiscal year. In the first months of the year 1931-32, volume advanced to 75 percent of the 10-year average but value continued downward to 60 percent of the average, indicating a downward movement in export prices. The resultant spread of fifteen points between the two turned out to be a constant relationship for the remainder of the period. The decline both in volume and in value continued until late in the spring of 1933, at which time the former reached a low of 43 percent of the 10-year average and the latter a low of 31 percent.

Recovery from these levels came with the inauguration of the new monetary policy. By the fall of 1933, industrial exports had advanced, as a result of increased foreign buying at the newly lowered gold prices, to 60 percent of the 10-year average volume and 49 percent of the 10-year average value. After remaining at about this level for one quarter, a further advance was made until in the summer of 1934 the volume index reached 70 percent and value 55 percent. This position was maintained except for minor changes throughout 1934-35. Although the increase in manufactured goods exported has been widely distributed among the many and varied industrial items, certain of these commodities have risen to much higher levels than have others in the group. Very large gains have been reported in the export of automobiles, parts and accessories, motor trucks, agricultural implements, paper and stationery, sanitary ware, confectionery products, felts, woolen goods, and mohairs and velvets.

Different responses to changed demand conditions

The significant differences between the reactions of agricultural and industrial exports to changing economic influences may be summarized as follows:

1. During the past five years the volume of agricultural exports seems to have moved consistently in an exactly opposite direction from that taken by the volume of industrial exports. In contrast, the two economic classes of exports show a close relationship with respect to fluctuations in value.

UNITED STATES EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS, CONT'D

2. In the period of falling demand, industry limited its quantitative output, thus maintaining prices, while agriculture expanded physical output with a consequent lowering of prices. The net share in total export value remained practically unchanged for each group since agriculture could not market a sufficiently greater quantity at the lowered prices to increase total dollar returns.

3. The short-time effect of devaluation in the spring of 1933 was to stimulate purchases of agricultural commodities and increase prices and total value, but as time wore on decreased purchases at the higher prices offset this stimulus to increased value. Industry, on the other hand, secured a long-time advantage from devaluation as dollar prices remained rigid, insuring a continued competitive advantage by virtue of lowered gold prices.

4. Some improvement in foreign purchasing power has appeared during the last two years, and the total value of United States exports has been increased. The larger returns for agricultural exports came through decreased supplies sold at higher prices. Industry's more substantial recovery in export value was accomplished by the marketing of increased physical quantities at unchanged prices.

5. Barriers to trade are less severe in the industrial field than in the agricultural. Agriculture has been confronted with: (a) Intense efforts on the part of foreign nations to gain self-sufficiency, which have taken the form of higher tariffs, additional excise taxes, strict quota allotments, complicated sanitary and mixing regulations; (b) direct subsidies granted by foreign countries to their domestic agriculture; (c) the resultant increase in agricultural production in these formerly deficit countries; (d) the increase in production in low-cost surplus countries; (e) "Colonial preference"; and (f) the credit stringency and the exchange difficulties confronting potential importers. The market situation for industry is somewhat different, for in the last few years very few new barriers to trade in industrial products have been put into operation abroad. Except for two or three European countries where quotas and exchange regulations have recently been placed in effect giving complete control of all imports, protective regulations have remained undisturbed.

6. One of the most important considerations in the export situation is the fact that the wide application and the increase in severity of trade barriers to agricultural products has been more pronounced in Europe than in other parts of the world. Closing of the European market, even to a small degree, is of vital importance to American agriculture for, ordinarily, more than two thirds of all farm products exported from the United States are sold in Europe. Industry could not be so harmfully affected by changes in European trade policy, as that market does not usually take more than one third of the manufactured products exported by the United States.

Trends in the export of agricultural and industrial products during the past few years reflect the results of the economic forces just outlined. Reductions occurred in both agricultural and industrial exports to Europe, but agriculture was most seriously affected because of the fact that there

UNITED STATES EXPORTS OF AGRICULTURAL AND INDUSTRIAL PRODUCTS, CONT'D

lay its most important market. When world business began to recover, agriculture did not share equally in the general increase in demand because of the European barriers to trade which had in the meantime been raised to unprecedented heights. At the close of the period, agricultural exports are found to be held back from natural recovery by a multiplicity of new artificial restrictions imposed against them in their most important market. The existing stringency in exchange and credits constitutes a serious difficulty confronting both agricultural and industrial exports, but industry has not, for the most part, been forced to overcome any other unusual restraints.

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PROPOSED CHANGES IN BRITISH SUGAR-BEET SUBSIDY SCHEME a/

A reduction in the amount of the subsidy paid to sugar-beet growers in Great Britain is foreshadowed by the proposed sugar policy officially announced at the end of July, according to a report from the London office of the Foreign Agricultural Service. Financial assistance on a diminishing scale is proposed throughout a transitional period of from two to five years, during which time the beet-sugar factories, which are to be merged into an amalgamated corporation, will be expected to reduce their operating costs. The official statement of policy was based upon the report of a government committee that was appointed in April 1934 to inquire into the United Kingdom's sugar industry. Acceptance of the policy depends upon subsequent parliamentary action.

It will be recalled that the British subsidy of 19 shillings, 6 pence, per hundredweight (4.28 cents per pound) established in 1924 and successively reduced to 13s. in 1928 and 6s.6d. (1.43 cents) in 1931, was extended on February 6, 1935, at the rate of 5s. per hundredweight of white sugar plus appropriate allowance for capital invested in sugar-beet factories. The government committee recommended that the allowance for such charges should be established at 1s.6d. per hundredweight for 1935-36 and, although the government is not necessarily committed to accept this figure, it has been used in arriving at the estimated cost of the subsidy, 6s.6d. per hundredweight, for 1935-36. This figure is the same as that which has prevailed since 1931, but the subsidy on molasses, approximately 9d. per hundredweight of white sugar since 1931, is no longer in effect.

With respect to the 1936 crop, the proposed plan contemplates a subsidy of 5s.3d. (1.19 cents per pound) on an amount of white sugar not exceeding 560,000 long tons. This is equal to the estimated production in 1935, when the subsidy was limited to the produce of 375,000 acres of sugar beets. This proposed subsidy rate is based on the assumption that the 1935 contract price for beets not in excess of the production limit will be 35s. per long ton for factories now paying 36s., and 36s. for factories now paying 38s. This price is for 15.5 percent sugar content, plus or minus 3d. for each 0.1 percent above or below 15.5 percent. The subsidy rate is also to be contingent upon a price of 4s.6d. per hundredweight of raw sugar of

a/ This is the first of a series of statements by Agricultural Attaché C. C. Taylor covering British agricultural policy.

PROPOSED CHANGES IN BRITISH SUGAR-BEET SUBSIDY SCHEME, CONT'D

96° polarization, pre-duty, a refining margin of 13s. per hundredweight and the present duty preference of 4s.3d. per hundredweight for white sugar. Any marked variation from these standard levels, considering 35s. as the ultimate standard price for sugar beets, is to be offset by corresponding adjustments in the standard subsidy rate of 5s.1½d.

Changes are also proposed with respect to the relations between sugar-beet factories and refiners. Prior to 1928, nearly all of the factory output was white sugar, but, in that year, the customs duty on foreign sugar, exceeding 97° and not exceeding 98° polarization, was reduced 2s.4d. per hundredweight, refined sugar basis, with proportionate reduction on sugar of lower polarization. This was reflected in a corresponding reduction in the price of white sugar and the sugar-beet factories had to meet this price. The factories were only partially relieved by a reduction of 1s.6²/₃d. per hundredweight in the excise duties on white sugar. Since the excise duties on raw sugar were reduced by the full equivalent of 2s.4d. per hundredweight, this consideration, together with certain technical features of sugar manufacture, resulted in an advantage of about 1s. per hundredweight in the production of raw sugar. In consequence thereof since 1930-31 between 40 and 60 percent of the factory output has been raw sugar, subsequently sold to the refiners. The factories in turn used their plants to refine imported raw sugar. The refineries attempted by various means to induce factories to concentrate on the production of raw sugar. They reduced the refining margin by offering favorable prices for raw sugar and by making reductions in price of refined sugar. An industrial agreement was negotiated in January 1933 by which definite quotas were allocated to each of the competing units. Factories were allotted a total quota of 500,000 long tons of white sugar, of which not more than 70 percent was to be produced during the beet campaign. Unused quotas have been sold to refiners at prices approximating 1s.4½d. per hundredweight.

To establish a working basis for the development of a new sugar policy, the government proposes to make no change in the existing customs, excise, and subsidy differential scales until after March 31, 1941. The factories will be allotted quota rights for the production of 720,000 instead of 500,000 long tons of white sugar per year, but will limit the exercise of this quota to 500,000 tons. The refiners, in return, agree to purchase all quota rights offered to them at 1s.4½d. per hundredweight, with provision for abatement of the quota value if the refining margin falls below 13s. per hundredweight. The value of these quota rights added to 5s.1½d., which is the proposed subsidy on the basis of 35s. beets, happens to amount to the present subsidy rate of 6s.6d., but only for that quantity covered by salable quota rights. Under this scheme the government will pay considerably less from the treasury than heretofore, but part of this difference will be made up by the refiners' purchase of quota rights.

To facilitate the administration of the scheme, an independent Sugar Commission will be appointed by the government, and the creation of a Sugar Beet Marketing Board to represent the growers has been recommended.

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ARGENTINA BUYS NEW COTTON GINS

The establishment of eleven new cotton ginneries in the Argentine cotton belt is announced with the reported purchase of 33 cotton gin stands of American manufacture, according to the "Gaceta Algodonera", the Argentine cotton trade journal, for September 30, 1935. Some of these ginneries will be equipped with compresses for the pressing of bales of high density.

In addition to the above mentioned purchases, the "Gaceta Algodonera" reports that a well-known firm of American cotton merchants and exporters, which recently entered the Argentine field, plans to establish from 12 to 13 ginneries in the cotton belt, the equipment for which is now en route from the United States. This company is also reported to have undertaken the distribution of cotton seed to farmers, not only in the regions where cotton is already firmly established, as in the Chaco Territory, but in some of the neighboring provinces and territories, including Santa Fe, Corrientes, Salta, and Entre Ríos, where the production in past years has been relatively insignificant.

INCREASED UTILIZATION OF COMMERCIAL FERTILIZER IN GERMANY

The utilization of commercial fertilizers other than lime in Germany during 1934-35 was about 15 percent greater than in the previous year, according to a report prepared in the American Consulate at Frankfort on the Main. The increase was attributed to the improved financial position of farmers, together with an aggressive governmental program aiming at greater self-sufficiency in the production of agricultural products. The following table shows the consumption of the various types of fertilizers during the past two years.

Item	1933-34	1934-35
	<u>Short tons</u>	<u>Short tons</u>
Nitrogen (in terms of N content):	421,000	469,000
Phosphoric acid (in terms of P ₂ O ₅ content):	509,000	598,000
Potash (in terms of K ₂ O content):	786,000	900,000
Lime (total bulk weight):	a/ 1,184,000	2,284,000
Total:	2,900,000	4,251,000

American Consulate, Frankfort on the Main, Germany.

a/ Incomplete.

THE HUNGARIAN HOG AND PORK INDUSTRY a/

Hungary is the principal hog-producing country of the Danube Basin though hog numbers in 1934 totaled only 2,500,000 head. At times, Hungary furnishes serious competition to other lard and hog-exporting countries. From a production and processing point of view, Hungary has no competitive advantage over other exporting countries except a great elasticity in pork output. At the present time, however, Hungary does enjoy some political advantage in its trade with certain central European countries, and its proximity to important fat deficit countries gives it some advantage in the export of live, fat hogs. The sharp increase in exports of lard and hogs from Hungary during the past two years has resulted largely from the ability and willingness of that country to accept industrial goods and raw products in exchange. Some liquidation of frozen credits in Hungary has also been accomplished through the export of Hungarian hogs. As long as present barriers to international trade make it necessary to exchange goods or services under barter or clearing arrangements, Hungary will continue to enjoy certain export advantages. However, should there be a general scaling down of tariff walls and even a partial elimination of other trade barriers, it is doubtful that Hungary could regularly meet the competition from other more important surplus pork-producing countries.

Hog production is an integral part of Hungarian agriculture but production costs are high and processing plants are not designed for producing export pork products in quantity. A substantial and continued increase in hog numbers appears unlikely because of the uncertainty of the domestic corn crop to which hog production is closely allied. Hogs of both the meat and lard types are produced in Hungary but lard hogs are by far the more important. About 60 percent of all the hogs are produced by small farmers, peasants, and landless workers who use them primarily to supply their own needs. Commercial production, which is confined chiefly to the large estates, is of secondary importance.

The system of hog management followed in Hungary permits rapid but limited changes in the commercial output of hog products without corresponding changes in hog numbers. The peculiar characteristics of the Hungarian lard hogs make it possible to carry the pigs, after weaning, on grass and waste feeds until they are a year to a year and a half old. Then, if feed is available and conditions warrant, they are fattened; otherwise they can be continued on waste feeds. Lard hogs are usually marketed at weights well in excess of 250 pounds but hogs held on the smaller farms, in particular, are maintained at relatively light weights. It is estimated that only about one third of the total production of lard hogs ordinarily enters commercial channels. The others are held on the farms and constitute a reserve from which feeders can be drawn and fattened quickly when needed for city trade or export. When commercial requirements result in a deficit in rural supplies, this can be at least partially overcome by feeding the remaining hogs to heavier weights.

a/ Based on a report by H. E. Reed, American Agricultural Commissioner in Berlin.

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

Under the conditions existing in Hungary, it is more advantageous to export live fat hogs than hog products. The recent large exports of lard have resulted in an excess of pork and thereby necessitated a certain amount of subsidization. Despite the recent increase in Hungary's exports of hogs and hog products, exports, with the exception of lard, have not reached the levels of 1929-30 and are much below the trade conducted within the old Austro-Hungarian customs union.

The recent increase in lard exports from Hungary resulted not from an expansion in hog numbers but may be attributed to the decline in United States exports to Germany and the United Kingdom. In 1934, lard from the United States encountered difficulties in entering Germany because of currency restrictions and quotas. Hungary, through compensation agreements and clearing arrangements, was able to take advantage of this situation and exported about 30,000,000 pounds of lard to Germany as compared with an average of about 10,500,000 pounds during the years 1929-1933. Likewise in 1935, when United States exports of lard to the United Kingdom declined, Hungary shipped over 6,600,000 pounds of lard to the United Kingdom in the first six months of the year. In 1934, such exports were negligible. Although these quantities are not large when compared with United States exports of lard in 1933, when Germany took about 35,000,000 and the United Kingdom over 56,000,000,000 pounds, it shows that Hungary has partially replaced the United States in these markets.

The hog industryImportance of hogs in Hungarian economy

Hungary is primarily an agricultural country and produces exportable surpluses of livestock and grains. Hogs have always been important in Hungarian agriculture but became especially so during the 19th century, when there was an increase in corn production and a greater demand for fat hogs from the industrial centers of the old Austrian Empire and central Europe. In Hungary hogs have a relationship to corn quite similar to that obtaining between corn and hogs in the United States. The corn surplus and the number and weight of hogs entering commercial channels are influenced one by the other. Agricultural income studies made by the Hungarian Farmers National Association from records of 201 representative farms during 1933 show that 22.1 percent of the cash income of farmers was derived from cattle, 20.7 percent from grain, and 18.8 percent from hogs. These data, while indicating the relative importance of hogs as a source of cash income, do not show their real importance in the national economy. Over half (51.8 percent in 1934) of the population, numbering about 8,500,000, obtain a living from farming, and it has been estimated that small farmers, peasants,

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farm laborers, and their families total about 4,000,000. This group depends largely on hogs as a source of meat and fat. Pork and hog-fat consumption is higher and beef and veal consumption is lower among the peasants and in the rural districts generally than is the case in the cities, ^{a/} because pork and lard can be cured and kept more satisfactorily under farm conditions. One authority has stated that, next to bread, pork and hog fat are the most important items in the diet of the Hungarian lower classes. Available data indicate that commercial marketings and exports of hogs are of secondary importance. About two thirds of the hogs produced in Hungary are consumed on farms and in the villages and do not enter commercial channels. Consequently, hogs are most important as a source of food for the agricultural population, although they rank about third as a source of cash farm income.

Distribution and types

Although Hungary produces hogs of both the lard and meat types, the 1934 census showed that lard hogs outnumbered meat hogs about 5 to 1, there being then 2,059,000 lard hogs as against 443,000 meat hogs. Lard hogs are kept primarily for the purpose of supplying the rural population with meat and fats, and production in excess of these requirements is largely dependent upon market conditions and the size of the corn crop. The distribution of lard hogs in Hungary bears a close relationship to corn production; data for 1934 show that the lard hogs are located in the principal corn-producing sections. See table, page 687. Meat hogs are used chiefly for supplying the cities with meat, and their distribution seems to be related more closely to centers of population than to feed supplies. Available information indicates that meat-type hogs constitute nearly half of the number entering commercial channels. This bears out the assertion that most of the lard-type hogs are consumed on farms and in villages.

The Mangolica is representative of the lard hogs produced in Hungary, a breed which was developed from Serbian hogs during the 19th century. Prior to that time Hungarian hogs were of an unimproved type but they had

^{a/} Meat and fat consumption data for all Hungary are not available. The Statistical Yearbook of the Municipality of Budapest gives the following consumption figures for meats in Budapest, in pounds per capita:

	1930	1931	1932
Total meat.....	90.3	87.5	89.3
Pork.....	37.6	36.7	34.5
Young pigs.....	.2	.2	.3
Salami and canned meat.....	.8	.6	.7
Beef.....	29.2	26.9	28.1
Veal.....	16.0	17.0	20.4

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unusual hardiness and an ability to subsist under adverse conditions. They were kept for the most part on waste land, obtained a part of their food from the swamps of the Danube, and were fattened in forests on acorns and beechnuts. Early in the 19th century, a large part of the forests and swamp lands were brought under cultivation, and Hungary began producing corn on an increasingly large scale. Serbian hogs were therefore imported and fattened on corn. Their superior fattening ability was soon recognized by the Hungarians, and they were further improved through selection by the Hungarian breeders until in time the Mangolica replaced the unimproved types.

The outstanding characteristics of the present-day mangolica are hardiness, grazing ability, late maturity, and fattening proclivities. These traits adapt Mangolicas to the conditions under which hogs are produced in Hungary and enable them to survive. They can subsist and develop on grass and waste feeds. While maturity may be delayed by methods of management, Mangolicas, even when liberally fed, do not reach their maximum development and a marketable condition until they are about 15 months of age. After attaining a weight of from 120 to 165 pounds at one year or more of age, they fatten rapidly. Most of the gain in weight comes after being placed on a heavy corn ration and is in the form of fat.

Poor quality and low prolificacy are the most objectionable features of the Mangolicas. Meat from Mangolica hogs, in addition to being excessively fat, lacks the taste and texture of pork from hogs of the meat breeds. Such meat does not satisfy the demand for fresh pork of the better class of consumers and is best suited for further processing as salami or other prepared meats.

Although Mangolicas are usually a dirty gray in color, they are described as "blonde" in Hungary. Formerly, black Mangolicas were produced there also, but they are almost extinct, and at present are not regarded as pure by the Herdbook Association. In the winter, Mangolicas grow long bristles which are shed in the summer months. Mature boars weigh from about 200 pounds up; sows average about 55 pounds less. There are usually only about five pigs, or even less, to a litter.

Meat hogs in Hungary are represented by the British breeds, of which the Yorkshire, Middle white, and Berkshire are the more numerous. About 1860, the owners of large estates attempted to popularize British meat breeds, but the movement did not spread. Hungarian people at that time preferred fat Mangolica pork. In pre-war days, most of the meat hogs in Hungary were produced near the Austrian frontier, and the city of Vienna was the principal market for them. A somewhat greater interest in meat hogs was developed about 1910, when the city demand showed a preference for leaner meat. Further developments were halted by the World War, but since then there has been a growing demand from cities for lean meat. This has given

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a stimulus to the production of lean pork, and numbers of meat hogs in Hungary have greatly increased. Importations from England have been made in order to improve the Hungarian stock.

The influence of meat hogs on Mangollicas is in evidence at markets, in feed lots, and on farms. The undesirable characteristics of the Mangolica can be partly corrected in the first cross, but many authorities fear that their desirable qualities will be lost if crossing is generally used. Cross breeding, however, results in a "two-way" hog which after a short feeding period, can be marketed as a meat hog or carried to lard-hog weights.

Hog numbers and trends

Lard hogs declined slightly in numbers from 1928 to 1931, which tendency may have resulted from the improved efficiency of breeding stock, restricted export outlets, the downward trend in hog prices, and the increase in dairy farming. This decline was accentuated in 1932 and 1933 by a cholera epidemic, but by 1935 numbers had practically recovered to the point from which they had been reduced. Future tendencies are not entirely clear as increases or decreases depend largely on domestic corn production and export outlets. Further increases appear to be unlikely under present conditions, and there are indications that numbers much in excess of those of 1933 will be officially discouraged unless justified by subsequent developments.

Because most of the lard hogs are kept primarily for supplying the rural population with meats and fats, the reaction of lard-hog numbers to the influences of the hog-corn ratio is not so great as it otherwise might be. Corn is an uncertain crop in Hungary; annual production varies widely from year to year, and as a result of changes in corn prices fluctuations in the hog-corn ratio are very wide. Since 1929, this ratio has ranged between 5.4 to 1 and 15.8 to 1, but variations in hog numbers have not exceeded 12 percent, except when affected by the cholera epidemic. Between 1924 and 1934, the annual census as of March 1 revealed a tendency toward a 3-year production cycle. See table, page 683. Further study suggests that the cyclical trend probably resulted from the influence which the corn crop exerted upon the commercial production of lard hogs. See table, page 686. It so happened during the last nine years that a good or fairly good corn crop was produced about every third year. The hog-corn ratio was most favorable in early 1930, when the good corn crop of 1929 coincided with a reduction in hog numbers, and again in late 1932, when the good corn crop of 1932 was being marketed and hog numbers had been greatly reduced by cholera. From 1926 to 1934, increased hog numbers followed increased corn production, and decreases followed reduced corn production with a time lag of about 1 1/2 years. Other influences, particularly the cholera epidemic of 1932-1933, explain most of the fluctuations in hog numbers that are not accounted for by the corn crop.

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Numbers of meat hogs increased steadily from 1924 to 1934, except when cholera swept the country. There is no evidence of feed prices having influenced this increase. It resulted from a growing demand in the cities for lean meat. In view of the present low consumer purchasing power, it may be that numbers of meat hogs have been increased beyond requirements, and a decline may take place. The export of meat-type hogs is handicapped by high protective tariffs on light-weight hogs, and export demand is largely limited to lard hogs, lard, and fat backs. On the home market, prices of meat hogs are adversely affected by the cheap pork incident to lard production. Producers in Hungary have taken some encouragement from the reduction in meat-hog production of Czechoslovakia and Austria, but as yet no substantial benefits have been noted. The policy of the agricultural associations, which heretofore have encouraged the production of meat hogs, is directed at present toward improving quality rather than increasing numbers.

Plan of management

As previously stated, peasants and small farmers own about 60 per cent of all the hogs in Hungary, and the bulk of these are lard hogs. The remaining hogs are mostly in the hands of large estates, which carry on most of the commercial fattening operations and supply the majority of hogs entering commercial channels. Lard hogs are generally marketed at weights well in excess of 250 pounds, and weights of 450 pounds or more are not uncommon. Hogs for meat consumption are marketed at much lighter weights, and hogs retained by the peasants are, for the most part, maintained in feeder condition at relatively light weights.

Meat hogs are handled in Hungary much as they are in other European countries, but the system followed in the production of lard hogs is peculiar to the Danube Basin. Pigs, after weaning, are carried on grass, stubble fields, waste lands or waste feeds until they are from 1 to 1 1/2 years old and weigh from 120 to 165 pounds. They may then be sold as feeders, fed out by the owners, or continued as scavengers in feeder condition. Breeding hogs also depend largely on waste feeds for their living. This method of handling seems to be generally followed by peasants and the less progressive farmers, and it is also followed by the large estates when prices and market conditions appear to justify it.

The practice of holding most of the lard-type hogs at relatively light weights permits rapid expansion or contraction in pork production, without marked changes in total hog numbers. The lard hogs owned by small farmers and peasants act as a reserve, although the quality of the reserve is not so high as that of most hogs entering the trade. When market conditions are favorable and feed supplies plentiful, hogs can be drawn from the reserve, fattened to heavy weights, and marketed much more quickly than could be done under a system requiring increased breeding operations to expand output. The deficit in rural supplies, which might result from

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increased commercial production, can be overcome by feeding to greater weights those hogs remaining on farms. On the other hand, when increased output is inadvisable, the hogs in "reserve" on the farms can be kept at low weights on waste feeds or slaughtered at light weights for rural consumption. While the system of management accounts for the elasticity in the pork output of Hungary, its success depends largely upon the fact that the Mangolicas are peculiarly adapted to the methods employed. It is apparent that even greater increases in output than those which have taken place in the past are possible, but the limiting influences of corn supplies, coupled with relatively small hog numbers and large domestic pork requirements, are also obvious.

Production practices

Insofar as possible, Hungarian farmers attempt to follow a 2-litter system. Mangolica sows are bred when they are a year and a half old, and February is the peak month for farrowing. December and January pigs are more desirable, however, because they are usually better developed by the time grass is available than are the later pigs. The maximum use of grass is possible in the maintenance of Mangolicas. On the large estates, grain is fed along with grass under certain conditions in order to develop the feeder hogs more quickly. Sows, producing two litters a year, are also well fed. Dry sows and boars are fed a small amount of grain to keep them in condition, but this practice is followed only on the large estates.

The hardy Mangolica hogs, handled under Hungarian conditions, are relatively free from disease. Cholera is the greatest plague. Since the severe epidemic of 1933, the simultaneous or virus treatment for immunity has been used with a great deal of success. In the large feeding plants, however, some difficulty with necro bacillosis has been encountered.

Fattening operations

Prior to the World War, most of the fattening operations were conducted by large commercial feeding plants centered around Budapest. The feeding plants drew feeders and corn supplies from the "lost provinces" as well as from present-day Hungary. In the post-war period, the maximum prices fixed during the war and the impossibility of securing supplies from "lost provinces" have driven many of these plants out of business. Consequently, since the war most of the commercial fattening has been done on the large estates; the dominant position held by them in this field is indicated by the top quotation of the Budapest market, which is cited on "prime young heavy lard hogs from large estates". Small farmers do little and peasant farmers practically no feeding for market. When they have surplus hogs, they are generally sold as feeders. One of the oldest commercial feeding plants at Budapest has been converted into a cooperative

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feeding plant where farmers may send hogs to be fed for their own account and then marketed. There are also other plants where small operators can have feeding done for them when they do not wish to sell their feeders.

Although corn is the basis of the fattening ration, it is not used so extensively as in the United States. The annual production of corn varies widely from year to year; Hungary exports in years of good crops and imports in bad crop years. The need for a nitrogenous concentrate to be used in connection with corn is recognized by experienced feeders. The protein content of the hog ration is supplied by using barley, oats, soybean meal, cowpea meal, shorts, Red Dog, alfalfa meal, meat meal, or cracklings. Next to corn, barley is the principal feed used in fattening operations; but, aside from barley, those feeds which are cheapest are the ones which are used to supplement corn.

Corn prices fluctuate widely; after a short crop other grains are often cheaper. The major trends are accounted for by production and crop prospects, but the short-time fluctuations in corn prices suggest speculative influences. Compared with United States corn prices, Budapest prices show wider fluctuations, a/ and the uncertain movement tends to encourage speculation in the fattening operations of Hungarian hogs.

As was stated above, hogs are placed on feed when they weigh from 120 to 165 pounds. Boar pigs which are to be fed out are castrated during the suckling period. It is also a rather general practice in Hungary to spay sows which are to be fattened. Most of the fattening is done in the summer and fall months. Pigs are generally started on barley after it is harvested, but they are finished on corn. Experienced operators state that very heavy hogs do not feed well in cold weather, although feeders will start off well in winter months. The feed is finely ground and fed as a slop, which no doubt partially accounts for the objection to winter feeding. The feeding period averages about six months, and in that time a 145-pound feeder should attain a weight of 350 to 375 pounds.

In general, there is a tendency to shorten the feeding period and to finish the hogs at lighter weights. There seems to be a rather widespread recognition of the higher costs incident to feeding to excessive weights, but the demand is stronger for the heavier hogs. Some interest is being taken in a feeding system called "express feeding", which involves feeding the sow well prior to farrowing, creep feeding the pig during the suckling period, and then feeding rather liberally up to feeder weight. Mangolicas are not altogether suited to this method of fattening, but the better quality of pork resulting from "express" fed hogs is said to bring a premium on the Prague market.

a/ Average January corn prices in cents per bushel:

	<u>1927</u>	<u>1928</u>	<u>1929</u>	<u>1930</u>	<u>1931</u>
Chicago spot price, No. 2, mixed					
domestic	77.1	88.6	93.4	85.3	66.0
Budapest, yellow corn	81.2	101.2	121.1	58.8	59.3

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The feed requirements per pound of gain are, of course, higher when hogs are developed over a long period and fattened to excessive weights than when they are finished at lighter weights in accordance with the natural growing tendencies of younger animals. Under the system followed in Hungary, Mangolicas do not compare favorably in feed utilization with hogs in other important pork-producing countries; consequently, a hog-corn ratio of about 7 or more to 1^a is needed at the farm in order to break even. Feeding costs could be reduced by feeding to lighter weights, but the finished hog would not have the lard yield expected of Mangolicas.

Meat hogs are fed in much the same way in Hungary as they are in other European countries. Apparently it is believed that good meat hogs cannot be produced on a heavy corn ration. The lack of a satisfactory home-produced protein to supplement and balance a corn ration is probably responsible for this attitude. In general, barley is the basis of the meat-hog ration, but corn is used when it is cheaper than other feeds.

Marketing

Hog markets are located at all important provincial centers, where stock yards are maintained by the municipalities. The yards at Budapest are the largest in Hungary and are quite modern in equipment. They handle over a third of all the Hungarian hogs entering commercial channels. The method employed in selling is similar to that of the central markets of the United States, sales being made through commission firms to butchers, wholesale slaughterers, and exporters. Commission firms are regulated by competition only, but the ease with which others can obtain licenses to operate acts as a check upon the charges of established firms. In spite of this, marketing costs in Hungary appear high in comparison with costs in some other countries, and they are made to appear complicated by the numerous small charges made for different services. Charges paid by the seller average around 10 percent of the sales price.

Cooperative livestock commission companies as known on United States markets are a very recent development in Hungary, and their success has not been definitely established. As would be expected from the high costs, direct marketing appears to be on the increase. Feeding operators who produce desirable meat or lard hogs have little difficulty in disposing of their supplies direct to slaughterers. Many dealers buy hogs from farmers on order from butchers and slaughterers or speculate on their own account.

In addition to the markets in cities and towns, temporary markets are set up in the provinces, to which the hogs are driven. These are attended by buyers, traders, local butchers, and feeding operators. If the hogs are not sold, they are driven back to the farm. Statistics show that only about half of the hogs offered on such markets are sold, a

^a/ See method of calculation, page 686.

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further indication of the low quality and condition of the hogs kept by small farmers and peasants. The uniform, well-fattened hogs from large estates are not offered on these markets.

The Government, through the Hungarian State Railways, has aided materially in solving transportation problems. Freight rates have been reduced, and the railway company maintains a trucking service from farm to shipping point. Government veterinarians make health inspections of hogs on foot at all municipal markets, and inspection stamps are tattooed on all hogs at points where inspected slaughter takes place.

The number of hogs inspected for slaughter plus those exported alive make up a relatively small part of total hog numbers. During the 5-year period 1929-1933, annual commercial marketings averaged only 2.6 times the number of sows of breeding age. It would appear that meat hogs made up a far greater proportion of commercial hogs than would be expected from a comparison of lard and meat-hog numbers. The meat breeds have a greater fecundity and cannot be withheld from market as long as Mangolicas.

The elasticity of the Hungarian pork output can be noted in the fluctuating annual numbers and the average weights of hogs entering commercial channels. See tables, page 684. Total marketings tend to follow hog numbers, but average annual weights are closely related to the profitability of feeding as indicated by the hog-corn ratio. See table, page 686. It will be noted that weights during late fall and winter months are above the annual average. This results from the practice of summer and fall feeding and the subsequent marketing of the finished hogs.

Prices of lard hogs have shown a downward tendency for several years; this reflects the low and declining world prices as well as the diminished purchasing power of Hungarian consumers. Exports of live hogs have varied from 8 to 17 percent of the commercial marketings over the past 10 years. Live-hog exports are chiefly lard hogs and represent an appreciable part of the lard-hog receipts. Consequently, the export price has had an important influence on the domestic price of lard hogs. The failure to respond to higher world prices for lard in the first half of 1935 may be attributed to the surplus pork problem created in Hungary by the increased production of lard. Seasonal trends in lard-hog prices are not indicated by available data.

Slaughtering and processing

In 1933, there were 983 public and 3,218 private slaughter houses in Hungary. Slaughtering for consumption in the cities and for export is conducted at the abattoirs adjacent to the principal markets. At these slaughter points, carcass inspection is made by veterinarians employed by the municipalities. The abattoirs and slaughter equipment are owned by the

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cities, and slaughterers and butchers pay a fee for the privilege of killing and dressing livestock in the abattoirs. Further processing usually takes place on the premises of the butchers.

Modern killing floors have been installed at the municipal abattoirs in Budapest and in a few other important centers. They are provided with electrical devices for stunning hogs prior to sticking, mechanical hoists, and rails to steam scalding vats, modern dehairing machinery, and rails from which carcasses may be opened and dressed. Where such equipment is not provided, hogs are thrown by hand for sticking, hoisted on block and tackle to the vats, scraped by hand, and carried to the rails by the scrapers.

The killing and processing costs, which include numerous taxes, are high in Hungary. The total cost from farm to slaughter amounts to about 26.3 percent of the value of the hog. Taxes make up most of the cost, but even without the taxes, processing costs would appear to be higher than they are in the United States. Plant and equipment have been planned for satisfying requirements of retail butchers in Hungarian cities and not for processing export products in quantity.

The slaughtering and processing unit is comparatively small, which partially accounts for the high costs and also for the poor utilization of by-products. Blood is saved by the stickers and goes to the killing crew as a "tip". At Budapest, an association of butchers and slaughterers has set up a small plant for handling the bristles from hogs slaughtered by its members. One firm buys, processes, and distributes all of the hearts, livers, pluck, etc., from the Budapest abattoir. Numerous casing firms buy and prepare the intestines.

The most desirable fat hogs for lard production weigh from 375 pounds up and carry a back fat of 4 inches or more with a corresponding thickness over the sides and belly. The dressing percentage of first-class hogs of the lard type ranges from 72 to 80 percent, and yields as high as 87 percent are not uncommon for extremely fat Mangolicas. The fat from desirable lard hogs amounts to as much as 60 or 70 percent of the dressed carcass weight, depending upon the condition of the hog. After the carcasses have been split, the fat from the back, sides, and belly is removed in one slab. Starting at the ham and working downward while the carcass is still warm, the layer of fat is cut loose from the muscular tissue. The slabs of fat are taken to the rendering room without cooling or chilling, and the remainder of the carcass is sold to salami manufacturers or to the cheap pork trade.

The meat hogs are dressed and handled in Hungary in a manner similar to that used for porker carcasses in other European centers. Wholesale slaughterers provide meat for those shops which do not kill. The municipality of Budapest also buys livestock, slaughters it, and distributes the meat through a chain of shops owned by the city.

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Lard production

Lard is rendered in Hungary by the open-kettle method. At Budapest, the kettles are heated by individual fires, and steam jacket kettles are not used. The unchilled slabs of fat, with skin attached, are put through hashing machines before being placed in the kettles. Leaf fat and fat trimmings are included with the external fats. After rendering, the fat is pumped into small retaining vats and cooled for 24 hours. When cool, several vats are emptied simultaneously through a mixer, and the blended lard is packaged from the mixer. As in other European countries, lard for export is packed in wooden boxes lined with parchment, containing 55 pounds net. Some barreled lard is prepared for export to Czechoslovakia. Export lard is held in cold storage until shipped. Cracklings are pressed and used as dog feed or made into meat meal.

All of the export lard produced in Hungary is rendered at Budapest. Large slaughterers who have satisfactorily demonstrated their ability to make a "standard" lard are licensed by the Foreign Trade Institute to use the "National Mark" on export lard. Small operators have the lard processed for their own account at a Budapest plant which has a license to use the "National Mark". Without this mark, lard cannot be exported. All lard is not inspected, but frequent inspections by Institute officials presumably keep the output ^{up} to standard. Lard falling under the standard must be reworked or used in the domestic trade. Specifications for so-called standard lard for export provide that only clean, healthy hog fat may be used; the addition of any foreign matter is prohibited; water content is limited to .3 percent, fiber content to .2 percent, and acidity to 1.5 percent.

Since the unit of production is small, Hungarian lard lacks the uniformity of product and regularity of supply demanded on important importing markets. It is not produced in large enough quantity to make it well known or widely distributed, and it is an entirely different commodity from American Refined Lard, the leader on European markets. Hungarian lard has a rather yellowish color, is granular in texture, lacks firmness, and has considerable taste and odor. Taste and odor are not necessarily objectionable in certain sections of Europe, but they keep Hungarian lard from meeting the demands of the more exacting markets. Furthermore, being soft, it does not ship or store as well as the firm United States refined lard.

There is little about Hungarian lard to make it attractive to distributing agencies; certainly there is nothing to give it a competitive advantage over United States lards. From the wide fluctuations in annual exports, it is obvious that Hungarian lard is regarded in European trade circles as "extra", and it is handled for the most part only when more desirable types are unobtainable. This situation is apparently recognized

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by many Hungarians, and they are giving some consideration to the installation of plants and equipment for manufacturing a product more comparable with United States refined lard.

Surplus pork problem and the Hog Marketing Board

The increase in the production and export of lard, which has taken place in the last two years, has created a surplus-pork problem. Pork from lard hogs is inferior to that from meat hogs, and the large quantity remaining from the expansion in lard manufacture has had a decidedly depressing effect on the hog market. An unofficial committee made up from producing, processing, and marketing interests adopted and administered a plan for handling the problem, which was given official recognition in October 1934 by a government decree. The committee, now known as the Hog Marketing Board, works in conjunction with the Ministry of Agriculture and the Foreign Trade Office. The functions of the Board are to study markets and marketing problems and to regulate the prices of hogs and pork products.

The Board sought to eliminate a part of the depressing effect of surplus pork on hog prices by removing the surplus from the market. This was done by subsidizing salami manufacturers. In theory, the meat was bought by the Board and resold to salami manufacturers at reduced prices; or, in other words, a part of the price paid by the salami manufacturers was refunded by the Board. By regulating the price of surplus pork, hog prices were raised and kept at fairly stable levels. Early in 1935, however, there were indications that, at the price prevailing, hog numbers would probably increase. To forestall such an increase in numbers, the Board removed its support and let the price of hogs fall. It is assumed that, when prices reach a level which will permit maintenance of the hog numbers required for stabilized production, support will be given again. Feed-price relationships, probable export outlets, domestic demand, and consumer purchasing power will, of course, require consideration in order to arrive at a desirable production level.

A fund for supporting the market, known as the Equalization Fund, is obtained from a levy on live hogs marketed at Budapest and, under certain conditions, from a fee on all live hogs exported. The levy is divided among and collected from the producer, the commission firm handling the sale, and the market corporation of the municipality. Recently the fund has been used for stabilizing prices of export lard, payment being made to the lard producer or exporter in such a way that prices of export lard have been the same regardless of the country of destination. Thus there exists in Hungary, as in many important hog-producing countries, a tendency toward stabilization of hog production.

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The export trade in hog products

The export trade in pork products has been a factor in the development of the hog industry in Hungary. While the bulk of production is retained for home consumption, that part which enters the trade, especially that which is exported, has a decided influence on the character of total production. Corn production and export outlets for hogs stand out as the factors which brought about the pre-war development of the industry along commercial lines. In the post-war period, these same factors have acted as limitations on the development of the commercial side of the industry.

Pre-war conditions

Prior to the 19th century, Hungarian hogs were scavengers, subsisting almost entirely on waste lands. They were used only in supplying a home demand for meat and fats. As corn production increased, hogs were improved in order to secure a greater utilization of feed supplies. The improvement in the fat hogs helped to create a demand for them from Vienna, Prague, and other centers of population and made possible an expansion in hog production, with a corresponding increase in fattening operations. Commercial feeding plants were established at or near Budapest in which both Hungarian and Serbian hogs, the latter having been driven overland to these feeding points, were fattened on corn produced in the Danube Basin. The development of railway transportation about this time was a great help in supplying the demand for pork from industrial areas.

About 1890, German tariff adjustments closed German markets to Hungarian hogs, and Hungary came to depend almost entirely on markets within the Austro-Hungarian customs union. In the absence of tariffs and other impediments to trade within the Dual Monarchy, the trade in live lard hogs between Hungarian feeding points and industrial centers of Austria expanded. Vienna, Prague, and other centers were largely dependent upon Hungarian feeding plants for their supplies of pork fat until after the World War. Hungarian production alone was not sufficient, however, to meet the demand from Austrian industrial areas, and Austria obtained part of its pork supplies from Serbia, both directly and via Hungarian feed lots. Up to 1906, when Hungarian hog interests succeeded in having an embargo placed on Serbian hogs, a poor corn crop in Hungary or Serbia usually resulted in marked increases in imports into Austria of United States lard and other pork products.

Post-war developments

The effects of the World War and the peace treaties which divided up Austria and Hungary have brought about many changes in the hog industry and export trade of Hungary. After parts of Austria and Hungary had been divided among the new and adjoining nations, the Hungarian hog industry found that a

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considerable part of what was formerly domestic territory had become an export market protected by import restrictions. A large part of Hungary's best corn-producing area was also lost and with it an important hog-producing region. The Hungarian hog-feeding industry formerly drew both feed and feeder hogs from the lost territory which is now competitive with Hungary in the production and export of hogs and hog products.

In the early post-war years, while Hungary was unable to supply its former markets because of depleted numbers, embargoes on the export of domestic pork products, and tariffs imposed by the new countries, United States lard became well established on those markets. It was difficult for Hungary to meet the competition offered in both quality and price because United States refined lard is an entirely different product from lard rendered under European methods.

Present situation

In recent years, most of the trade in hogs and pork products between Hungary and central European countries has resulted from compensation agreements and clearing arrangements. Hungary, while on an export basis as far as hogs are concerned, is on an import basis for many other commodities and has been able to dispose of a part of its surplus pork through what virtually amounts to the bartering of hogs for industrial goods and frozen credits of hog-importing countries. Exports of Hungarian hogs and pork products showed a declining tendency up to 1934, but since then a sharp increase has been noted. This increase resulted from the reduced competition of United States lard. Trade agreements which Hungary has recently negotiated with Germany and Czechoslovakia were also contributing factors. The principal export outlets for Hungarian pork and lard are Czechoslovakia, Germany, Austria, and England, and trade agreements involving compensation of clearing arrangements have been made with all but England.

The trade agreement with Czechoslovakia, signed in June 1935, brought to a close a customs war of about five years' duration and provided for an exchange of goods or services of equal values. Czechoslovakia will take approximately 80,000,000 Kc. (about \$3,300,000) worth of goods from Hungary annually. Hungary will take about 55,000,000 Kc. (\$2,300,000) worth of goods from Czechoslovakia, 5,000,000 Kc. (\$200,000) is to be set aside for use by Hungarian tourists in Czechoslovakia, and the remaining 20,000,000 Kc. (\$800,000) is to be used for other payment transfers from Hungary to Czechoslovakia. Among other exports, Hungary may send Czechoslovakia 23,000 lard hogs and 2,756 short tons of lard or fatbacks between June 1 and December 31, 1935. This compares with 20,000 hogs and 5,291 short tons of lard and fatbacks exported to Czechoslovakia during the year 1934. The policies which are followed by the Czechoslovak Government in regard to tariffs on imported hog fats, the manufacture of artificial fats, and domestic production indicate that further expansion of the trade in hogs with

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

Hungary is possible. There are also indications that the trade is tending to swing back to pre-war channels, when Czechoslovakia obtained the bulk of its pork-fat supplies from Hungary in the form of live hogs. a/

A triangular trade agreement, signed in May 1934 by Italy, Austria, and Hungary, among other things provides that Hungary's exports to Austria will have one and one-half times the value of Austria's exports to Hungary. Through this agreement, Hungary obtained a weekly quota of 1,850 lard hogs and 400 meat hogs for export to Austria. Hogs weighing over 298 pounds are admitted into Austria duty free, while quota hogs under that weight pay a tariff of 18 gold crowns per 100 kilograms (\$2.81 per 100 pounds). Consequently, Hungary's exports of hogs to Austria are confined largely to heavy lard hogs. Expansion of this trade in hogs is limited by economic conditions in Austria and the policy which the Austrian Government may follow with regard to domestic production.

The trade agreement between Germany and Hungary permits the annual export by Hungary of 1,000 carloads (11 short tons each) of lard and 150 cars of fat sides. The arrangement is a barter proposition, and lard prices are fixed by Hungarian officials in agreement with the German fat monopoly. While Germany is in a position to take lard from Hungary in exchange for industrial goods, an increase in this trade may be limited by the surplus pork problem incident to lard manufacture in Hungary. Ordinarily Germany has sufficient pork to meet domestic demands and at times has an exportable surplus. Due to a temporary pork shortage in Germany, imports of live hogs from Hungary would seem desirable. Hungary's export of lard to England is largely a result of reduced competition from United States lard on British markets. It is not impossible also that frozen British credits in Hungary may be involved in this trade. In any case, the export of Hungarian lard to England appears to be a temporary proposition, and Hungary's ability to compete with United States lard on the British market in both price and quality is yet to be demonstrated.

The Hungarian Government also attempts to stimulate exports of agricultural products through the exchange operations of the National Bank. Foreign exchange received in payment for exports must be turned over to the bank, which has different rates for converting foreign money into pengö. Losses may be made up by taxes on imported goods.

All these measures have resulted in some improvement in the export situation of Hungary. Increases in lard exports have taken place (see table, page 685), and some increase in the export of live hogs is to be expected from the negotiations recently concluded with Czechoslovakia. With the exception of lard exports, the improvement has not been sufficient to restore exports of Hungarian hogs and hog products to the level of 1929-30. Barter trade between central European countries has not been entirely satisfactory as agricultural exports, especially of pork products, generally require subsidization.

a/ See "Pork Production and Trade in Czechoslovakia", "Foreign Crops and Markets", Vol. 31, No. 12, September 16, 1935.

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

Commercial agreements and government assistance partially paved the way for exports of pork products, but the situation existing in the hog and pork trade of Hungary leaves much to be desired. The Hungarian export trade was built up on the basis of live-hog and pork-product exports. Apparently, the export of live hogs is a profitable business, but the increased production and export of lard during the last two years has created a surplus of cheap pork, and the measures adopted for handling the problem virtually amount to a subsidy on the manufacture of lard and salami.

HUNGARY: Numbers of hogs, by types, 1924-1934

March 31	Boars			Sows		Castrated Swine		Total
	Brood	Others	Under 1 year	Over 1 year	Under 1 year	Over 1 year	Under 1 year	
	Thou- sands	Thou- sands	Thou- sands	Thou- sands	Thou- sands	Thou- sands	Thou- sands	
Lard type <u>a/</u>								
1924.....	36	0	257	525	779	204	514	2,315
1925.....	24	16	253	574	796	221	593	2,482
1926.....	26	13	234	517	721	234	609	2,354
1927.....	23	10	203	483	663	211	576	2,169
1928.....	22	12	237	524	775	212	651	2,433
1929.....	22	10	196	506	702	248	650	2,334
1930.....	20	9	171	438	599	234	592	2,063
1931.....	20	12	204	495	678	215	688	2,312
1932.....	19	11	165	439	565	192	547	1,938
1933.....	18	6	125	357	438	182	462	1,588
1934.....	21	10	182	460	596	203	587	2,059
Meat type <u>b/</u>								
1924.....	2	0	11	27	49	11	43	143
1925.....	1	1	12	28	49	12	48	151
1926.....	1	1	14	30	53	13	54	166
1927.....	3	2	13	43	65	18	69	218
1928.....	3	1	19	56	31	13	81	259
1929.....	2	2	17	49	77	20	82	249
1930.....	2	1	21	59	89	21	106	299
1931.....	4	2	32	77	124	23	141	403
1932.....	4	2	28	80	130	26	153	423
1933.....	3	1	21	57	94	23	113	312
1934.....	3	1	32	83	139	27	158	443

Compiled by Belgrade Office, Foreign Agricultural Service from "Statieztika i Havi Kazlemenye".

a/ Principally Mangolicas.

b/ Principally English breeds.

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

HUNGARY: Number of hogs passing through commercial channels,
1922-1934

Year	Inspected slaughter	Exports of live hogs a/	Total	Inspected slaughter at Budapest
	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>
1922	620	71	691	292
1923	552	51	603	242
1924	613	46	659	251
1925	908	110	1,018	432
1926	1,199	157	1,356	587
1927	1,121	116	1,237	445
1928	1,220	103	1,323	470
1929	1,293	273	1,566	529
1930	1,254	249	1,503	512
1931	1,212	105	1,317	490
1932	1,063	117	1,180	472
1933	1,047	160	1,207	467
1934				

Belgrade office, Foreign Agricultural Service.

a/ Principally lard hogs.

HUNGARY: Average live weight of hogs at Budapest Municipal
Hog Market, by months, January 1929 to March 1935

Month	1929	1930	1931	1932	1933	1934	1935
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
January	251	256	276	238	260	251	265
February	243	247	243	247	265	254	271
March	231	229	249	251	251	236	265
April	229	231	240	225	231	238	
May	227	247	229	212	236	231	
June	229	238	234	214	240	276	
July	236	256	234	220	256	258	
August	238	260	249	238	254	240	
September	269	276	223	238	256	278	
October	249	271	234	245	269	284	
November	249	271	234	236	271	278	
December	247	227	209	240	265	260	
Yearly average	242	251	238	234	254	257	

Belgrade office, Foreign Agricultural Service.

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

HUNGARY: Exports of live hogs, by country of destination, 1922-1935

Destination	Austria	Czechoslovakia	Others	Total
	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>
1922	41	20	10	71
1923	23	28	0	51
1924	30	11	5	46
1925	31	25	4	110
1926	115	42	0	157
1927	60	55	1	116
1928	49	54	0	103
1929	154	116	3	273
1930	136	111	2	249
1931	90	15	0	105
1932	102	14	1	117
1933	136	21	3	160
1934	105	20	1	126
1935				
Jan. 1 - June 30				85

Belgrade office, Foreign Agricultural Service.

HUNGARY: Exports of lard and pork fat, by country of destination, 1925-1934

Destination	Austria	Czechoslovakia	Germany	Others	Total
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
1925	1,000	1,000	1,000	1,000	1,000
1926	3,307	14,350	0	1,543	19,180
1927	5,732	26,255	3,307	661	35,935
1928	2,205	13,668	1,102	1,323	18,298
1929	441	7,716	221	661	9,039
1930	0	5,511	882	1,323	7,716
1931	1,102	14,992	441	1,984	18,519
1932	6,614	441	2,204	441	9,700
1933	220	7,275	0	221	7,716
1934	0	11,905	1,102	221	13,228
1935	0	10,582	19,180	0	29,762

Belgrade office, Foreign Agricultural Service.

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

HUNGARY: Corn production and exports, marketing years 1921-22 to 1934-35.

Marketing Year	Production	Exports
	<u>1,000 bushels</u>	<u>1,000 bushels</u>
1921-22	31,703	20
1922-23	48,726	110
1923-24	49,245	130
1924-25	74,122	4,378
1925-26	87,967	7,846
Average 1921-22 to 1925-26	58,353	2,497
1926-27	76,543	2,405
1927-28	68,347	2,071
1928-29	49,592	878
1929-30	70,630	6,086
1930-31	55,395	465
Average 1926-27 to 1930-31	64,101	2,381
1931-32	59,749	126
1932-33	95,743	7,744
1933-34	71,228	1,988
1934-35	82,598	a/ 591

Belgrade office, Foreign Agricultural Service.

a/ Estimated.

HUNGARY: Hog-corn price ratio, by months, January 1927 to May 1935 a/

Month	1927	1928	1929	1930	1931	1932	1933	1934	1935
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
January ...	8.1	6.4	5.6	12.1	9.7	5.9	12.9	13.5	6.3
February...	8.2	6.3	6.0	13.3	8.9	5.9	13.3	11.4	5.7
March	9.1	6.0	6.2	13.5	8.9	5.8	14.0	9.1	6.2
April.....	8.5	5.7	6.5	12.1	8.1	5.2	14.1	9.4	5.9
May	7.4	5.7	7.2	10.7	7.3	6.5	13.8	7.8	5.8
June	7.1	5.4	7.1	8.4	7.3	6.6	11.6	6.7	
July	7.2	5.6	7.5	7.2	7.4	6.5	10.1	7.2	
August	6.9	6.1	7.6	7.9	7.6	8.2	10.8	7.3	
September...	7.1	6.1	7.5	8.5	8.9	12.4	11.3	6.7	
October.....	7.2	5.5	7.4	8.8	7.3	16.6	9.7	7.3	
November...	6.2	5.4	10.4	9.3	7.8	15.5	9.2	8.3	
December....	6.0	5.8	11.1	10.3	7.0	14.0	13.2	7.2	

Belgrade office, Foreign Agricultural Service.

a/ Number of pounds of corn equal in value to one pound of hog live weight.

Corn price, monthly average, Budapest. Hog price monthly average price of prime, young, heavy lard hogs from large estates, Budapest market. Not strictly comparable with United States hog-corn ratios, which are calculated on the basis of price per 100 pounds of hogs and price per bushel of corn.

THE HUNGARIAN HOG AND PORK INDUSTRY, CONT'D

HUNGARY: Relationship of corn production to distribution
of hogs, 1934

Province	Corn production 1,000 bushels	Number of lard hogs Thousands	Number of meat hogs Thousands
Transdanubia:			
Sopron	850	11	50
Vas	980	35	54
Zala	1,838	93	28
Somogy	6,031	202	40
Veszprem	2,720	82	20
Gyor, Moson es Pozsony	1,929	65	20
Komarom es Esztergom	1,520	37	9
Fejer	6,145	134	18
Tolna	4,968	133	27
Baranya	5,531	100	51
Total Transdanubia	32,512	892	317
Lowlands:			
Pest-Pilis-Solt-Kiskun	10,137	226	31
Bacs-Bodrog	4,771	78	7
Csongrad	4,638	82	10
Jász-Nagykun-Szolnok	6,708	121	11
Szatmar, Ugocsa es Bereg ...	1,083	48	1
Szabolcs es Ung	3,059	101	6
Hajdu	2,590	59	6
Bihar	1,898	75	3
Bekes	6,149	116	15
Csanad, Arad es Torontal ...	3,968	64	16
Total Lowlands	45,001	970	106
North Hills:			
Nograd es Hont	905	50	5
Heves	1,996	52	4
Borsod es Gomor es Kishont .	1,118	50	5
Abauj-Torna	358	16	2
Zemplen	705	29	4
Total North Hills	5,082	197	20
Total Hungary	82,595	2,059	443
Summary:	Percent of total	Percent of total	Percent of total
Transdanubia	39.4	43.5	73.8
Lowlands	54.5	47.1	23.9
North Hills	6.1	9.4	2.3

Compiled from data furnished by Belgrade Office, Foreign Agricultural Service.

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